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ABSTRACT

The seventh document in an eight-part series on a task-based management system for special education programs reported the goals and objectives of the project, evaluation techniques employed, and project recommendations and conclusions. The project's stated goal was the development of a process for managing special education resources (staff, facilities, materials, equipment, time, and money) in a way consistent with pupil needs. Final objectives of the project focused upon three areas of program development: determining and predicting manpower needs and resource requirements, defining detailed job descriptions for all program staff based upon learner objectives, and modifying inservice programs to be consistent with the responsibilities of each staff member. Functions of the advisory committee and the audit and evaluation teams were recounted. Research-oriented tasks identified during the project's first 2 years were recommended. (For related information, see also EC 050 205 through EC 050 210 and EC 050 212.) (GW)

A GUIDE FOR THE MANAGEMENT OF SPECIAL EDUCATION PROGRAMS

MENTALLY AND BEHAVIORALLY EXCEPTIONAL CHILDREN

Project Number 44-00000-0000-925
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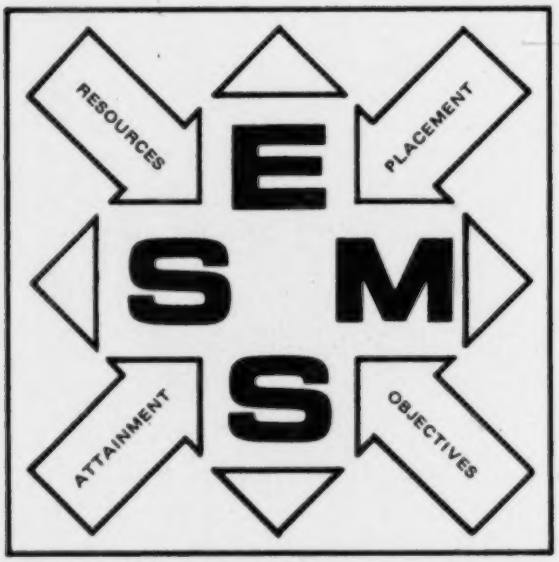

SPECIAL EDUCATION MANAGEMENT SYSTEM

7.0 THE PROJECT

Prepared Under
Contract By:
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EC 050 211

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COMPONENT 7.0

THE PROJECT

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7.1 GOAL OF THE PROJECT

A process is a series of tasks or operations leading to an end. In the process of education, the end is the educated pupil. The goal of this project has been to develop a process for managing special education resources* (staff, facilities, materials and equipment, time and money) consistent with pupil needs. The management system in this guide provides means to make sure that tasks needed to educate the pupil are done and that each contributes to the desired end. Program personnel represent the major resource of special education. Therefore, the management system relies on their participation to identify pupil needs and to translate these needs into planned staff activities.

The project was charged with developing a universal management system which could be used by any program serving the exceptional child. The resultant management system is to provide a variety of special education programs with the ability to identify staff activities so changes may be made to better serve the student. Additionally, the management system provides a means to develop and make use of job descriptions which relate these staff activities to progress of the pupils in the program.

To accomplish the goal of this project, the following had to be considered first:

- Would a management system developed in one district or county be general enough to be used by others?
- Would a general management system be specific enough to be used by other districts or counties?
- Would districts or counties outside those involved in the development of the system possess the skills and have the time to make use of the management system?
- What format would lend itself best to duplicating the system?
- What method could be used to show the relationship between staff tasks and pupil progress?

*Definitions of these terms are found in Appendix 8-1 at the back of this document.

These considerations were important in the design of the project. The management system would have to be both specific and general enough to be useful to special educators. It would have to be adaptable and as easy to use as possible. To ensure that the management system would meet these aims, the project developed two tools: the Task Base Composite (TBC) and the Behavioral Characteristics Progression (BCP).

This document is offered to the special educator to enable him to use the management system in his programs. The document is divided into components describing the tools of the system (Components 1.0 and 4.0), how to use them (Components 2.0 and 5.0), and materials for their use (Components 3.0 and 6.0).

7.2 OBJECTIVES OF THE PROJECT

As previously stated, the goal of the project was to develop an adaptable management system based upon the needs of the exceptional child. Originally, the project objective was to establish three alternative teaching and administrative techniques in the form of operational models of programs for handicapped children. Principles and techniques of system analysis would be used to identify these models. Each operational model, (optimal model, acceptable model, and minimal model) was to include goals for pupils and the program, as well as learner objectives and program procedures. Each model would include cost and expected changes in pupil performance levels.

A preliminary questionnaire sent to the field showed the information requested could not be gained in an easily usable form. Neither did it appear possible at this time to measure pupil progress gained from use of each of the models.

Therefore, during the course of the past two years, three modifications have been made to the project objective. Each modification has been a result of recommendations from the Audit and Evaluation Teams and has made the management system easier to duplicate for use with a variety of programs.

The first objective called for the participation of 50 school districts in a questionnaire to find out how much learner objectives are used in special education programs and to determine program costs and performance levels connected with these objectives.

The initial response to this questionnaire showed that:

- few programs could provide required staff time.
- few programs defined, developed, and used learner objectives in the same way or at the same level.
- few programs could identify program costs and relate them to learner objectives.

From this information, it was concluded that to use the operational models developed by the project, detailed methods for use would have to be offered. Such detail would make it impossible to adapt the management system to varied programs.

Revised objectives then were developed for the project. Instead of using questionnaires, information was gathered by visiting and observing various programs. Programs were analyzed in terms of staff tasks. From this program analysis, literature research, and the development of a tool for identifying pupil characteristics and needs (the Behavioral Characteristics Progression), it was determined that program tasks could be related directly to pupil needs. These changes in the project approach are accurately described as a change in method, since the goal of the project, to develop an adaptable management system, remained the same.

Based upon the revised approach to the project, approximately 300 staff tasks were identified from on-site analysis of six classrooms in the Pajaro Valley Unified School District. Tasks were arranged in groups under 22 functions in an attempt to illustrate the educational system. The intent was to use the task listing to help determine job responsibilities, hiring requirements, and to provide a basis for determining manpower needs. By making the task listing general enough to be acceptable to a variety of programs and yet specific enough to assist in defining individual staff responsibilities, it was felt that the required adaptability of the management system would be provided.

Upon the Interim Product Evaluation Team's review of the task listing, it was determined that such a listing was not sufficient to serve as the base for an adaptable management system. The Evaluation Team felt that as a process, the task listing was neither representative nor readily adaptable to all programs since it provided insufficient data. As a tool, the task listing was difficult to use and did not relate tasks to learner objectives. However, the listing and supporting information was accepted as program guidelines which would be expanded according to suggestions received from throughout the State. Los Angeles City Unified or another large metropolitan district was suggested as a source of data.

To improve upon the previous approach, the project made use of a task analysis system (See Section 1.9) developed by VORT Corporation. This task analysis system was used to analyze in detail the roles of more than 180 educators and staff members in programs representing a large metropolitan district, a rural district, and a medium-sized county. The Behavioral Characteristics Progression (BCP) was put through extensive field testing. Field consultations showed the task-oriented management tool and the BCP would work together. At this point, the project had narrowed down its specifications to apply to a management system:

- based upon staff tasks derived from learner objectives.
- presented in usable tools
- adapted easily to varying programs throughout the State.
- used to define staff responsibilities, coordinate work assignments, determine in-service requirements, and plan changes in program structure.

To verify the need for such a system and determine the best means of presenting the system, two questionnaires were sent out to secure statewide recommendations from the field. This response was instrumental in assisting the project staff to determine the exact format of the project document and tools.

As a culmination of two years of extensive research and field contributions, the project remained on its original course of developing an adaptable management system. Findings of the project, however, are in a format different than set forth originally. Rather than offering specific information on program costs, procedures, goals and objectives, the project has offered a method through which a program can identify its own processes and, therefore, start to develop its own program specifications.

The final objectives of the project, then, focus upon three prime areas of program development:

7.2.1 To develop a process for determining and predicting manpower needs and resource requirements.

7.2.2 To develop a method for defining detailed job descriptions for all program staff based upon learner objectives.

7.2.3 To develop a method for modifying in-service programs to be consistent with the responsibilities of each staff member.

7.3 DEVELOPMENT OF THE PROJECT

The project was designed originally as a year-long program to determine most efficient uses of resources. Preliminary research showed that available resources for special education programs throughout the state varied considerably. This variance would not allow the adoption of strict standards.

The project since has been expanded to a three-year effort. The first two years were spent in research and development,including identification of the best means of operating the management system. Additionally, the second year was spent extensively field testing the Behavioral Characteristics Progression.

At this point, therefore, after two years of development and partial field testing, the project document and tools are ready for preliminary dissemination and testing. The third year of the project, funded through Title III ESEA, will include dissemination of the management system and determination of its impact upon the pupil.

Statewide workshops will be held to describe the project documents and tools. From these workshops, programs will be selected to implement the management system. These programs, including Santa Cruz County Office of Education Programs for Exceptional Children, will take part in a five to six-month trial use. Facts gathered during this time will determine final alterations to the document and tools and recommendations for future development. Presently, 500 copies of this document are being distributed throughout the State to secure a broad base of opinion from educators.

7.4 PROJECT EVALUATION

As stated in the Acknowledgments, the Advisory Committee met seven times during the two years of the project. Throughout the course of the project, Advisory Committee members provided guidance and interpretation on the objectives of the project. The Advisory Committee did not evaluate the project. Their recommendations dealt with:

- Development of the Behavioral Characteristics Progression.
- Format of the Behavioral Characteristics Progression.
- Considerations for making the system adaptable.
- Methods for making the project document appealing and easy to use.
- Definition of staff responsibilities at the task level.

The Audit Team met twice during the project and both times worked diligently to assist the projec in narrowing its objectives to a realistic point. The team also helped define methods of documenting the project's findings. The Audit Team recommendations included:

- Using project management techniques such as PERT* in completing the project.
- Using nation-wide experts in helping to develop the Behavioral Characteristics Progression.
- Statewide field testing of the Behavioral Characteristics Progression.
- Disseminating the task analysis to districts and programs throughout the State.
- Minimizing the description accompanying the project document.
- Making the project tools as simple as possible.

The Evaluation Team, comprised of members of the Audit Team, met during the middle of the project to study the document to that point. It was during this evaluation that the project staff decided to provide tools and a narrative rather than a report.

One of the difficulties of the Audit and Evaluation teams was determining which set of objectives the project presently was pursuing. This was understandable because of the changes in project approach during the course of the two years. The final recommendation of the Audit Team was to continue the project for a third year to permit dissemination, continued field testing, and implementation of the management design.

The final requirements of the project agreed to by the Audit Team were as follows:

- To identify the tasks of special education in California.
- To arrange these tasks so they accomplish the education of the exceptional pupil.
- To present the process in a system using tools to facilitate program adaptation and individual usage and evaluation.
- To sustain the use of these tools through guidelines which permit resource allocation and use correlated to identified tasks and learner objectives.

All of the Audit Team and Evaluation Team recommendations were greatly appreciated by the project staff and, insofar as possible, were incorporated into the project approach. The final document and tools provide a composite of the recommendations and findings of the Audit and Evaluation Team, project research, field testing, and consultations.

7.5 PROJECT RECOMMENDATIONS

Due to the overall scope of the project, many components of the special education process have been carefully studied by this project. The list below offers some of the recommended research-oriented tasks identified by the project during the past two years:

7.5.1 Develop methods to identify programs willing to use the Behavioral Characteristics Progression.

7.5.2 Develop Behavioral Characteristics Progression adaptation procedures to fit individual programs.

7.5.3 Determine additional content for the Behavioral Characteristics Progression.

7.5.4 Determine the relationship between criterion or performance referenced* assessment tools (such as the BCP) and standardized or normative referenced* assessment tools (such as the Stanford-Binet).

7.5.5 Identify methods and materials appropriate for instructing and attaining the various learner objectives presented on the Behavioral Characteristics Progression.

7.5.6 Develop a card index or a computer managed sorting system for retrieving information about methods and materials for specific learner objectives.

7.5.7 Study and describe the steps necessary to relate a program's categories and funding methods to learner objectives.

7.5.8 Develop a home instruction program in which the parent would receive suggested instruction materials and information on the learner objectives that are being worked on in the classroom. The home instruction thus would be correlated to classroom instruction.

7.5.9 Perform a coordinated study between learner objectives and program content so the program is matched to the pupil.

7.5.10 Perform a thorough task analysis of selected programs throughout the State in order to determine program content.

7.5.11 Perform a task analysis of Bureau of Special Education activities relative to the Task Base Composite.

7.5.12 Perform a study to determine whether the task or the behavioral objective should be analyzed as to unit cost. The study should provide this information in a manner that requires minimal teacher involvement.

7.5.13 Provide in-service training to educators in the areas of time management and planning so that staff scheduling, backlog analysis and priority determination can be accurately applied to program management.

7.5.14 Provide coordinated in-service training to teachers in the areas of existing curriculum and instructional techniques.

While all of the above areas are worthy of attention, the time and effort required to implement the present project's tools and procedures prohibits the project staff from attempting to achieve many of the recommendations during its third year. However, the project staff will gather additional content for the BCP (7.5.3) and begin to gather data relating to methods and materials for specific learner objectives (7.5.5). The staff also will provide advice to help teachers coordinate parent home instruction activities with those of the classroom (7.5.8).

It is hoped that some or all of the recommended activities can be attempted by the State Department so that pupil benefit can be tied directly to program and teacher activities.

7.6 INFLUENCE ON SANTA CRUZ COUNTY OFFICE OF EDUCATION

All of the staff of the Santa Cruz County Office of Education special education programs participated in the task analysis procedures. This participation provided not only the necessary information for the management system, but also provided the project staff with an opportunity to field test some of the preliminary procedures associated with the management system.

The Santa Cruz staff completed approximately 10,000 of the 25,000 task analysis forms collected. Pertinent information was extracted for the overall management system and summarized by computer to give each staff member a composite of the tasks reported. The Santa Cruz staff then reviewed these individual composites, corrected and updated them, and resubmitted them for further study. The Santa Cruz staff then used the individual composites in conjunction with the overall composites to develop preliminary job descriptions. At the present time, the staff is starting to complete formal job descriptions for use next year.

As stated above, the first two years of the project have been primarily research and development; therefore, the management system has been only partially implemented in Santa Cruz County's special education program. The third year of the project will complete this implementation. The influence of the management system upon these programs will not be known until after the third year.

The Behavioral Characteristics Progression was field tested in Santa Cruz County's Development Center for Handicapped Minors (DCHM) and Mentally Disordered Minors (MDM) school program. Many of the TMR and DCHM staff have participated as consultants in the development of the BCP. However, it, too, has not been fully implemented in Santa Cruz, and its influence upon program operations has not been measured at this time.

7.7 RECOMMENDATIONS TO THE LEGISLATURE

One of the findings of the project was the patchwork structure of the Education Code and regulations. This is understandable since the Education Code reflects mandatory solutions to needs as they have been identified. While the Education Code is flexible and, therefore, does not relate to each and every step of the educational process, it is suggested that legislators consider the impact of legislation upon the process as now illustrated on the Task Base Composite chart. The impact of legislative action can be more effective if it is designed to meet the needs of the educational process and is directly related to pupil progress.

Additionally, while a structure of categories is necessary for funding, it is becoming clearer that categories and labels are not adequate to define the exceptional pupil. It is recommended that funding procedures and methods be tailored to pupil progress in terms of behavioral characteristics and learner objectives rather than existing categories. Tasks necessary to bring about such a change should be planned carefully. Care must be taken so one labeling approach is not exchanged for another.

It is further recommended that special education programs place emphasis on teaching specific behavioral areas and placing pupils in programs which provide needed skills. Presently, most teaching is not geared to the specific needs of the pupil. Recommended placement procedures can result in programs based upon individual pupil needs and better use of staff skills and resources.

It is suggested that credentialing procedures and educational code provisions should relate to the skills and tasks required in teaching and in administering a program. The project recommends that as program tasks become better defined, teachers' colleges use this information to form an effective curriculum. While the teacher's expertise lies in working with a pupil in a specific area of instruction,

overall effectiveness is dependent upon the teacher's management and scheduling of class time. It is also recommended, therefore, that teacher college curriculum include courses on observation of pupil behavior, time management, and simplified versions of task analysis. A teacher who knows the subject matter, who is a reliable observer, and who is a good manager of time should be able to progress a pupil measurably.

The Bureau of Special Education for the California State Department of Education has developed a model for establishing administrative, supervisorial, and consultive manpower requirements. This model will be presented as part of the Special Education Master Plan for California to the State Board in October, 1972. The procedures offered in this project document are directly compatible with those offered by the manpower model in the Master Plan.

7.8 CONCLUSIONS

The management system at this publication date is in preliminary form; it has been partially field tested in Santa Cruz County special education programs. It represents a synthesis of much information based on the experience of the people for whom the management system was intended. It is expected that during the next year, many revisions will be necessary on the Task Base Composite (TBC) and its associated procedures. The Behavioral Characteristics Progression (BCP) already has undergone one year of field testing and, therefore, is more nearly a finished product.

It should be stressed, however, that neither the TBC nor the BCP ever will be complete. They represent simple tools for determining the present status or level of pupils and programs. There are too many behavioral characteristics or staff tasks to present in any one tool. Both the TBC and BCP are usable in their present form and offer as well a starting point for discussion, communication, and updating.

Additional copies of the documents and charts will be available at cost from the Santa Cruz County Office of Education. It is hoped that the field will provide any comments, suggestions or alterations identified during usage of this document and its tools to the Santa Cruz County Office of Education. (See evaluation forms at the end of Components 2.0, 5.0 and 6.0.) In August, 1973, it is expected that an updated version of the project document and its tools, based upon returned comments, will be available.